

BDDS Portal Provider Training 8:

Viewing the Monitoring Checklist

September 25, 2018



Viewing the Monitoring Checklist

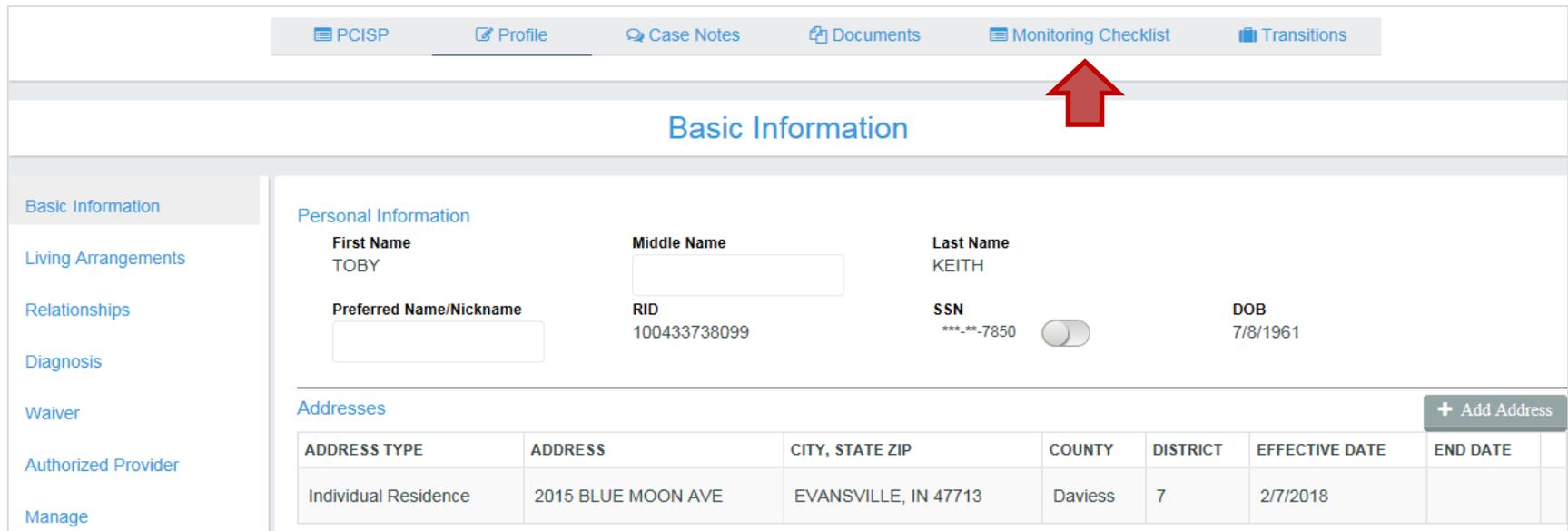
The Basics

Monitoring checklists:

- are for a specific a point-in-time
- are required every 90 days
- are based on the Service Plan year
- include the following sections:
 - General
 - Service Plan
 - PCISP
 - Behavior
 - Psychotropic Meds
 - Risk Plans
 - Nutritional/Dining Needs
 - Medical
 - Medications
 - Seizures
 - Staffing
 - Fiscal
 - Employment
 - HCBS Settings
 - Choice & Rights
- include governing questions that determine what sections are required



Viewing the Monitoring Checklist



The screenshot displays a web application interface with a navigation bar at the top containing links for PCISP, Profile, Case Notes, Documents, Monitoring Checklist, and Transitions. A red arrow points to the 'Monitoring Checklist' link. Below the navigation bar is a section titled 'Basic Information'. On the left is a sidebar with links for Basic Information, Living Arrangements, Relationships, Diagnosis, Waiver, Authorized Provider, and Manage. The main content area is divided into 'Personal Information' and 'Addresses'.

Personal Information

First Name TOBY	Middle Name <input type="text"/>	Last Name KEITH	
Preferred Name/Nickname <input type="text"/>	RID 100433738099	SSN ***-**-7850 <input type="checkbox"/>	DOB 7/8/1961

Addresses [+ Add Address](#)

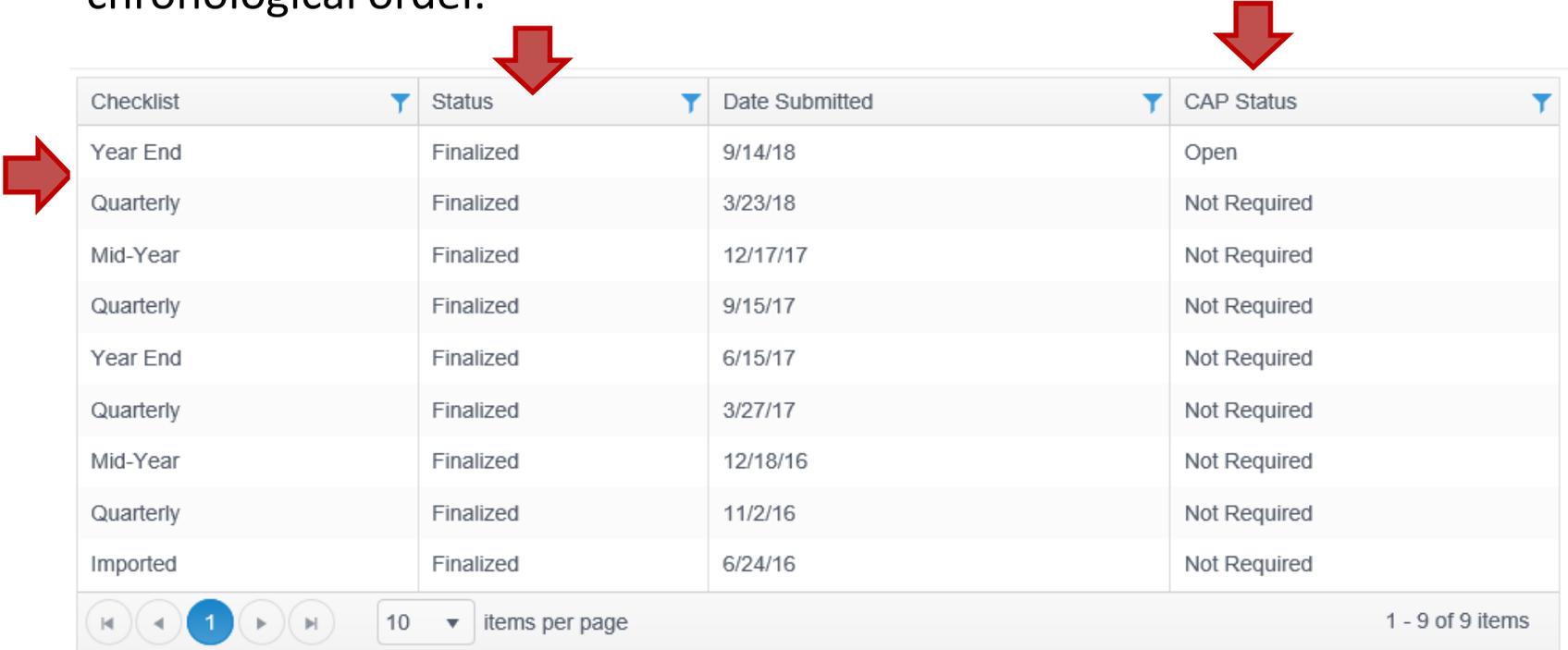
ADDRESS TYPE	ADDRESS	CITY, STATE ZIP	COUNTY	DISTRICT	EFFECTIVE DATE	END DATE
Individual Residence	2015 BLUE MOON AVE	EVANSVILLE, IN 47713	Daviess	7	2/7/2018	

To view a monitoring checklist, first go to the individual's record. The link to his or her checklist page is found on the individual specific navigation bar just under the header. Clicking this link will open the Monitoring Checklist / Checklist Listing page.



Viewing the Monitoring Checklist

Here all finalized checklists and checklists in process are listed in reverse chronological order.



Checklist	Status	Date Submitted	CAP Status
Year End	Finalized	9/14/18	Open
Quarterly	Finalized	3/23/18	Not Required
Mid-Year	Finalized	12/17/17	Not Required
Quarterly	Finalized	9/15/17	Not Required
Year End	Finalized	6/15/17	Not Required
Quarterly	Finalized	3/27/17	Not Required
Mid-Year	Finalized	12/18/16	Not Required
Quarterly	Finalized	11/2/16	Not Required
Imported	Finalized	6/24/16	Not Required

10 items per page 1 - 9 of 9 items

Status:

Finalized: Checklist is complete

Active: Checklist is in development

CAP Status:

Not required: No corrective action plans

Open: Unresolved corrective action plans

Completed: Resolved corrective action plans



Viewing the Monitoring Checklist

Checklist Listing

Next Checklist Type: Mid-Year

Next Checklist Due Date: 5/31/2018

PCISP

Profile

Case Notes

Documents

Monitoring Checklist

Transition

Checklist	Status	Date Submitted	CAP Status
Quarterly	Finalized	3/2/18	Not Required
Year End	Finalized	12/13/17	Not Required
Quarterly	Finalized	8/24/17	Not Required
Mid-Year	Finalized	5/23/17	Not Required
Quarterly	Finalized	3/3/17	Not Required
Year End	Finalized	12/1/16	Not Required
Quarterly	Finalized	9/15/16	Completed
Imported	Finalized	6/6/16	Not Required

10 items per page

Above the navigation bar, the Next Checklist Due Date and Type are identified. Checklist types describe the budget year period for which the checklist was created but include identical sections and questions.



Viewing the Monitoring Checklist

Checklist Listing

Next Checklist Type: Mid-Year

Next Checklist Due Date: 5/31/2018

PCISP

Profile

Case Notes

Documents

Monitoring Checklist

Transitions

Checklist	Status	Date Submitted	CAP Status
Quarterly	Finalized	3/2/18	Not Required
Year End	Finalized	12/13/17	Not Required
Quarterly	Finalized	8/24/17	Not Required
Mid-Year	Finalized	5/23/17	Not Required
Quarterly	Finalized	3/3/17	Not Required
Year End	Finalized	12/1/16	Not Required
Quarterly	Finalized	9/15/16	Completed
Imported	Finalized	6/6/16	Not Required

Navigation: 10 items per page

To access a checklist, simply click anywhere on the line of the desired checklist.



Viewing the Monitoring Checklist

General

	Current	Previous	CAP
General	<input checked="" type="checkbox"/>		
Service Plan	<input checked="" type="checkbox"/>		
PCISP	<input checked="" type="checkbox"/>		
Behavior	<input checked="" type="checkbox"/>		
Psychotropic Meds	<input checked="" type="checkbox"/>		
Risk Plans	<input checked="" type="checkbox"/>		
Medical	<input checked="" type="checkbox"/>		
Medications	<input checked="" type="checkbox"/>		
Seizures	<input checked="" type="checkbox"/>		
Staffing	<input checked="" type="checkbox"/>		
Fiscal	<input checked="" type="checkbox"/>		
Environment	<input checked="" type="checkbox"/>		
Employment	<input checked="" type="checkbox"/>		
HCBS Settings	<input checked="" type="checkbox"/>		
Choice & Rights	<input checked="" type="checkbox"/>		

Is this an In-Home visit?	Yes ▾	No
If this is not an In-Home visit, where?	<input type="text"/>	
Is this visit un-announced?	No ▾	No
Individual receives Behavioral Support Services?	Yes ▾	Yes
Individual has or requires risk plans?	Yes ▾	Yes
Individual is prescribed psychotropic medications?	Yes ▾	Yes
Individual has nutritional / dining needs?	No ▾	No
Individual requires seizure management?	Yes ▾	Yes
Individual is 16 years of age or older?	Yes ▾	Yes
Completed Date	08/16/2018	<input type="calendar"/>
Individual lives in provider owned or controlled setting?	Yes ▾	Yes

On the left side of each page is a section navigation menu. Clicking the links on the menu will direct the user to any given section within the checklist.



Viewing the Monitoring Checklist

General

General	✓		Current	Previous	CAP
Service Plan	✓	Is this an In-Home visit?	Yes ▾	No	
PCISP	✓	If this is not an In-Home visit, where?	<input type="text"/>		
Behavior	✓				
Psychotropic Meds	✓	Is this visit un-announced?	No ▾	No	
Risk Plans	✓	Individual receives Behavioral Support Services?	Yes ▾	Yes	
Medical	✓	Individual has or requires risk plans?	Yes ▾	Yes	
Medications	✓	Individual is prescribed psychotropic medications?	Yes ▾	Yes	
Seizures	✓	Individual has nutritional / dining needs?	No ▾	No	
Staffing	✓	Individual requires seizure management?	Yes ▾	Yes	
Fiscal	✓	Individual is 16 years of age or older?	Yes ▾	Yes	
Environment	✓	Completed Date	08/16/2018		
Employment	✓	Individual lives in provider owned or controlled setting?	Yes ▾	Yes	
HCBS Settings	✓				
Choice & Rights	✓				

Unlock View Cap Delete

Governing questions appear on the General page of checklist. When the response to any of the governing questions is No, the section and all related questions are removed from the checklist.



Viewing the Monitoring Checklist

General

	Current	Previous	CAP
Is this an In-Home visit?	<input type="text" value="Yes"/>	<input type="text" value="No"/>	
If this is not an In-Home visit, where?	<input type="text"/>		
Is this visit un-announced?	<input type="text" value="No"/>	<input type="text" value="No"/>	
Individual receives Behavioral Support Services?	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	
Individual has or requires risk plans?	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	
Individual is prescribed psychotropic medications?	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	
Individual has nutritional / dining needs?	<input type="text" value="No"/>	<input type="text" value="No"/>	
Individual requires seizure management?	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	
Individual is 16 years of age or older?	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	
Completed Date	<input type="text" value="08/16/2018"/>		<input type="text" value="📅"/>
Individual lives in provider owned or controlled setting?	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	

In addition to the response to questions for the current checklist, the responses to questions on the previous checklist are also displayed.



Viewing the Monitoring Checklist

General

	Current	Previous	CAP
General	Yes ▾	No	
Service Plan			
PCISP			
Behavior			
Psychotropic Meds			
Risk Plans			
Medical			
Medications			
Seizures			
Staffing			
Fiscal			
Environment			
Employment			
HCBS Settings			
Choice & Rights			

Is this an In-Home visit?

If this is not an In-Home visit, where?

Is this visit un-announced?

Individual receives Behavioral Support Services?

Individual has or requires risk plans?

Individual is prescribed psychotropic medications?

Individual has nutritional / dining needs?

Individual requires seizure management?

Individual is 16 years of age or older?

Completed Date

Individual lives in provider owned or controlled setting?

Unlock View Cap Delete



The Completed Date represents the date of the team meeting or face to face visit that corresponds to the viewed checklist.



Viewing the Monitoring Checklist Corrective Action Plan (CAP)

Does the PCISP contain the current nutritional and dining needs and are those needs addressed in a written plan that has been updated in the last year and is available to staff?

Current	Previous	CAP
No ▾	<input type="text"/>	 

When the response to a question triggers the creation of a corrective action plan, a link will appear in the CAP column. Clicking the link will open the screen on the next slide.



Viewing the Monitoring Checklist

Corrective Action Plan ✕

Issue Answered (No) to Question: Does the PCISP contain the current nutritional and dining needs and are those needs addressed in a written plan that has been updated in the last year and is available to staff?

Action Plan

Responsible Entity

Target Date for Completion 

Resolution

Date Resolved 

Clicking the CAP link will open the CAP and allow it to be viewed. Please keep in mind, providers' access to the Monitoring Checklist allows information to be viewed, but checklists, including CAPs cannot be edited in any way.



Viewing the Monitoring Checklist



View Cap

Additionally, viewers may use the View CAP link at the bottom of each page to display a list of corrective action plans.



Viewing the Monitoring Checklist

QUESTION	TARGET DATE	ACTION PLAN	RESOLUTION	RESPONSIBLE ENTITY	RESOLVED DATE	RESOLUTION VERIFIED BY	VIEW CAP
Is Human Rights Committee (HRC) approval and informed consent present for all restrictive interventions used with the individual?	8/3/2018	Requested HRC approval with informed consent from John Smith, BC	CM will upload the HRC once it is received from	John Smith, BC and HRC			
Is there informed consent and Human Rights Committee (HRC) approval for administration of the psychotropic medication to the individual?	8/3/2018	Requested HRC approval with informed consent from John Smith, BC	CM will upload the approved HRC once received into the CM portal.	John Smith, BC and HRC			

The list will open and all corrective action plans, regardless of status, will display.



Viewing the Monitoring Checklist

HOME > WAIVER PARTICIPANT LISTING > CHECKLIST LISTING > CHECKLIST

- **Home:** BDDS Portal Home Dashboard
- **Waiver Participant Listing:** Monitoring Checklist Homepage
- **Checklist Listing:** List of checklists completed for the individual currently viewed

To exit the monitoring checklist from any page, click on the desired link at the top of the page. Home will exit the monitoring checklist section and direct the user to their BDDS Portal home page; Waiver Participant Listing will direct the user to the home page of the monitoring checklist; and Checklist Listing will return the user to the list of checklists completed for the same individual.



BDDS Portal Trainings

<https://www.in.gov/fssa/ddrs/5437.htm>

- BDDS Portal Provider Training 1: Accessing the BDDS Portal
- BDDS Portal Provider Training 2: User Management (for System Administrators)
- BDDS Portal Provider Training 3: My Cases / Caseload Assignment
- BDDS Portal Provider Training 4: Navigating the Portal
- BDDS Portal Provider Training 5: Individual Profile
- BDDS Portal Provider Training 6: Document Library
- BDDS Portal Provider Training 7: PCISP
- BDDS Portal Provider Training 8: Viewing the Monitoring Checklist
- BDDS Portal Provider Training 9: Viewing Transitions

